

## REQUISITION CHECKLIST

This checklist is intended to aid AgriLife Business Offices in the creation of requisitions for orders greater than \$25,000.00, vehicle purchases regardless of dollar amount, and copier rentals/leases regardless of dollar amount. This checklist is not all-inclusive, and additional information may be requested by the AgriLife Procurement Office upon receipt of the requisition. Requisitions submitted without the minimum information listed below may be returned by the AgriLife Procurement Office. Submission of the checklist is not required. Contact the AgriLife Procurement Office if there are any questions about what information is required prior to submitting the requisition.

The sections below list minimum requirements based on the method of procurement.

- COMPETITIVE SOLICITATION ORDER
  - List of required specifications (for products) or scope of work with period of service (for services)
  - List of suggested sources and contact information
  
- CONTRACT BASED ORDER (AGRILIFE, TAMU, DIR, BUYBOARD, OMNIA PARTNERS, ETC)
  - Valid/current quote referencing contract number
  - Sales rep name and contact information
  - Vendor set up in AggieBuy (do not use Suggested Supplier)
  
- SOLE SOURCE ORDER
  - Valid/current quote
  - Sales rep name and contact information
  - Vendor set up in AggieBuy (do not use Suggested Supplier)
  - Correct Sole Source Form (AG-608) used (must be on AgriLife form)
  - Sole Source Form does not reference price
  - Sole Source Form lists other sources of similar products by name
  - Sole Source Form is signed by end user and Department Head/Resident Director
  
- EMERGENCY ORDER
  - Notify AgriLife Procurement of situation as soon as possible
  - Valid/current quote
  - Sales rep name and contact information
  - Vendor set up in AggieBuy (do not use Suggested Supplier)
  - Emergency Justification Form (AG-603) completed and signed by end user and Department Head/Resident Director
  
- NON-COMPLIANT ORDER
  - Vendor set up in AggieBuy (do not use Suggested Supplier)
  - Completed Non-Compliant Explanation Form (AG-628) signed by end user and Department Head/Resident Director
  - Invoice attached to requisition in AggieBuy, if applicable

**The sections below list minimum requirements based on the type of commodity or service being purchased. These are required in addition to the requirements of the applicable procurement method listed above.**

- CONSTRUCTION/FACILITIES
  - Coordinated with Campus Planning, Design, & Construction (CPDC) for on-campus projects or AgriLife Facilities Management & Construction (AgFMC) for off-campus projects *prior to* submitting requisition
  
- COPIER RENTALS/LEASES (REGARDLESS OF DOLLAR AMOUNT)
  - Checked 'Route to Procurement' box on requisition in AggieBuy
  - Separate line item on requisition for each fiscal year of rental/lease period
  
- VEHICLES (REGARDLESS OF DOLLAR AMOUNT)
  - Checked 'Route to Procurement' box on requisition in AggieBuy
  
- INDEPENDENT CONTRACTORS
  - Statement of Work with period of service and estimated total dollar value
  - Correct Independent Contractor Status Certification Form used (SRS accounts must be on SRS form and non-SRS accounts must be on AgriLife form)
  - Independent Contractor Status Certification Form is signed by end user, departmental representative, and SRS/AgriLife Contracts
  
- INFORMATION TECHNOLOGY (HARDWARE, SOFTWARE, WEBSITE/APP DEVELOPMENT, ETC)
  - For hardware and software, approved by AgriLife IT to purchase outside of the TechBuy Program
  - For all IT products, reviewed by AgriLife IT for EIR accessibility compliance or waiver
  - For cloud-based products/services, reviewed by AgriLife IT for TX-RAMP compliance
  - For products/services with access to sensitive information, reviewed by AgriLife IT for data security compliance
  
- PRINTING
  - Completed Printing Bid Request Form (AG-604)
  
- TRADE-IN
  - Trade-in item information (make, model, year, etc)
  - AgriLife asset number
  
- USED/DEMO/REFURBISHED EQUIPMENT
  - Statement signed/approved by Department Head stating why purchasing used/demo/refurbished instead of new (can be cost savings – include estimated amount of possible savings)
  - Statement describing the general condition and appearance of the equipment if it has been inspected by someone in the department (can be combined into one document with statement above)

**NOTE:** It is AgriLife Procurement's goal to process all requisitions in a timely manner. Submission of complete and accurate documentation is the first step to achieving that goal. However, some orders require additional processing steps prior to creation of a purchase order. The two most common additional processing steps are:

- Orders greater than \$100,000 that include contracts which require signature must be routed to the Texas A&M System Office of General Counsel for review to ensure terms and conditions are agreeable to the Agency.
- Competitive solicitations must be posted for bidding for a minimum of ten (10) business days.

**When planning your purchase, please allow ample time for these, and other, additional processing steps.**